

Logistics Summary

Scheduling

Scheduling can be complex, thus taking a great deal of time and effort. Follow these best practices/hints when scheduling include:

1. Determine how to group participants (business unit, job function, PC skill level, mixed, etc.)
2. Lock the list of participants early, don't change unless there is an emergency
3. Schedule tentative dates
4. Ask for conflicts when conducting your audience analysis (e.g. find out what dates participant cannot attend)
5. Lock down sites and tentative dates - try to secure a group of dates
6. Develop an Excel spreadsheet for tracking purposes
7. Schedule participants for tentative dates
8. Manipulate scheduling to account for participant preference and groupings, equal class sizes, etc.
- 9. Confirm Locations**
- 10. Confirm Dates**
- 11.** Send out invitations and reminders - the reminders should cover dress, some basic expectations (e.g. there will be no time to return to the office mid day, class begins promptly at 8 am with a continental breakfast at 7:30, etc.)
- 12. Coordinate meals/snacks**
- 13. Coordinate all required training materials** (including pens, pencils, paper, post-its, highlighter, quick reference guides, instructor guides, name tags or name placards)

Tips:

- Identify all tasks in the training plan and action item list. Brainstorm to identify any critical tasks that have been left off
- Double check and confirm all logistics
- Have phone numbers for meals, participants, support, etc handy before and during class
- Establish contingency plans

General Training Logistics

Delivery Methods

a) Expert-Led/Instructor-Led Training (ELT/ILT)

Expert-led training in the classroom will require training rooms (equipped with PCs when training on a system) and display panels (LCDs) for the instructors. Classroom training sessions should have up to 12 users for maximum learning capabilities.

The Scheduler should coordinate with the Training Site Coordinators and should consider potential user conflicts when scheduling (e.g., vacation, bumping, etc). They will also keep in mind the training development and implementation (when system related) schedule. Some support materials may only be ready after going live.

b) Computer-Based Training (CBT)

Facilitated computer-based training will require training rooms equipped with PCs. There may be some users who use the CBT as a self-paced learning tool – use without the guided walkthrough of a facilitator in a scheduled session. This training can be done during a classroom session or back at the participant's workstation.

c) Coaching

Coaching session logistics are similar to those of ELT, except that the number of users is much smaller. Coaching sessions are conducted in small classrooms, offices or portable classrooms at the participants' work location. Coaching sessions involve a coach and anywhere from one to three users.

Trainers/Instructors Preparation

Pilot review session

Review the pilot training experience - what were the strengths, things to change, lessons learned, what did the participants think, what did they ask, what was confusing, etc.

Train the Trainer session:

Teach trainers how to best facilitate a training class, tips for success, how to handle difficult situations, what to expect as a lead instructor, and how to communicate concepts

Review modules:

Trainers should review modules during and after development is complete to gain a sense of what types of questions participants will ask in each section and how to respond to those questions

Dress rehearsal/Dry Run

Conducted with trainers only (or with training team only) with the following purposes:

- Allow the instructors to practice in front of an audience
- Gain familiarity with the materials
- Gain a sense of timing
- Double check course timings
- Identify areas to add more depth or take away depth
- Allow business experts to learn the system, the flow of class, and what is expected of them in a training class (it is helpful to meet with the business experts prior to the dry run)
- Allow support persons for to practice their role(s) in training
- Identify areas that are confusing
- Flag potential issues for the classes

Load instructor laptops

Load training databases with any required software (Excel, Word, PowerPoint) and systems training databases.

Facilities

The Training Scheduler and the Training Site Coordinators will work together to complete the facilities list and coordinate training scheduling.

Load participant PCs/Laptops:

- Install needed software (PowerPoint)
- Load correct version of training database (Siebel, COD)
- Test all training databases
- Test all machines for all requirements
 - Hard Disk space
 - Memory (RAM) space

- CD-ROM Drives
- Double check instructor PCs

Room setup (refer to training plan for equipment needs):

- Tables, chairs, PCs, etc. should be set up so participants can easily see and instructors can easily move around
- LCD projector
- Video Display (size, location)
- Printer
- LAN lines

Pre-class prep (each day):

- Prepare sheet with all class information ahead of time:
 - Participants
 - Instructors
 - Support
 - Meal information
 - Phone numbers
- Arrive 15 min. prior to continental breakfast
- Double check room set up:
 - Turn on PCs, double check that all files are loaded, including the correct training database
 - Turn on overhead and check connections
 - Test lighting and temperature
 - Straighten up materials and room
 - Have extra materials available in class

Post-class prep (each day):

- Collect any remaining evaluations
- Clean and straighten room
- Set up the classroom
 - Set out training materials (use prepared checklist)
 - Ensure each participant has pen, pencil, paper, highlighter, post-it notes, training materials, name tag or name placard
 - Make copies of any additional materials needed
- Hang wall charts
- Refresh training databases
- Review the day's events - how did the class flow, where can simple changes be made, what questions came up, what went well, what didn't

EXAMPLE Timeline

		week 1	week 2	week 3	week 4	week 5	week 6	week 7	week 8	week 9	week 10	week 11
Logistics	POC											
Logistics Planning & Role Definition												
Course numbers determined												
City, # of Sessions, and Locations determined												
Catering Secured	Vicki											
Facilities Secured (Regional, Hotels)	NCS-Pearson											
Contracts for space into SFA for review												
Contracts for space signed by SFA												
Registration System Operational	Ed Cole/Scarlett											
Registration System Loaded	Ed Cole/Scarlett											
Registration System Live	Ed Cole/Scarlett											
LC and LH Applications Distributed	Anita											
LC and LH Applications Due	Panel											
LC and LH Application Review	Panel											
Availability Verification with Managers	Vicki & Anita											
Logistics Coordinators & Hosts Determined	Panel											
Logistics Coordinators & Hosts Notified	Anita											
LC/LH Training Materials Finalized and Distributed												
Logistics Coordinators Trained												
Logistics Hosts Trained												
Logistics Coordinators Scheduled												
Registration Tracked and Communicated	Reg & Log Team											
Course support materials ordered	Pat & Dan											
Pre-Packaging of Materials	Reg & Log Team											
Packaging & Shipping Materials	Vicki/Dan											
Operating Partners Numbers	Sarah/Vicki											